



# CTTC Year in Review



## Did You Know? Fast Facts

- ➔ The CTTC, in partnership with the travel industry, generated an additional \$100 million from 1998–2003 to run over 20 cooperative marketing programs — helping California effectively compete with other tourist destinations like Hawaii, Florida and Las Vegas.
- ➔ In 2003, tourism generated \$78.2 billion in direct travel spending for California's economy, and produced \$5 billion in direct state and local tax revenues. As California's fourth largest employer, tourism supports nearly 900,000 jobs.
- ➔ In the first six months since taking office, Governor Arnold Schwarzenegger has stepped up as a powerful spokesperson for California tourism, participating in the following events and programs: New York media event, international Pow Wow in Los Angeles, CTTC Web site and "Welcome to California" television spot.

## New Leadership for California and the CTTC



Caroline Beteta,  
CTTC Executive Director

### August 2004

The California Travel and Tourism Commission's (CTTC's) fifth year of operation was marked with invigorating new leadership. In

November 2003, Arnold Schwarzenegger was sworn-in as Governor and immediately established himself as the new leader for jobs and the economy, with tourism playing an important role in this endeavor. Governor Schwarzenegger and first lady Maria Shriver quickly committed to being ambassadors for California tourism — stepping up to participate in the CTTC's highly-acclaimed, 30-second "Welcome to California" television spot, on the CTTC's Web site, in the CTTC's New York Media Marketplace and Reception, and finally, to address over 5,000 delegates at this year's international Pow Wow in Los Angeles.

elected officers included: CTTC Vice Chair of Marketing Claire Bilby, Vice President of Sales and Distribution Marketing for Walt Disney Parks and Resorts; CTTC Vice Chair of Executive Operations Ted Burke, Owner of Shadowbrook Restaurant; and CTTC Chief Financial Officer Terry MacRae, Owner of Hornblower Cruises and Events.

Looking ahead, we move into the future with a wealth of marketing programs, trade shows, visitor publications, communications efforts, and more — all designed to keep California top-of-mind as a premier vacation destination. At the same time, as the state of California continues with severe budget challenges, the CTTC and travel industry leaders are pursuing a strategic planning process to increase the overall tourism marketing budget through a variety of industry-driven funding options.

With the CTTC's favorable relationship with Governor Schwarzenegger, a bold new CTTC Chair in Sunne Wright McPeak, and new CTTC officers and commissioners, I look forward to the future of the CTTC as we all work together to promote this great state!

The momentum continued with the gubernatorial appointment of Sunne Wright McPeak, a highly-charged professional with solid economic development credentials, as Secretary of the California Business, Transportation and Housing (BT&H) Agency. As such, she assumed responsibility as Chair of the CTTC.

New commissioners were also installed via an industry-wide referendum in early 2004 (see list on back page). The CTTC's newly-

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**The California Travel and Tourism Commission (CTTC) created and directed a variety of successful and award-winning marketing programs during the 2003–2004 fiscal year. Following are highlights of these activities:**

## Domestic Marketing Strategy

The CTTC continued advertising in television and print media in the western United States to keep California top-of-mind in awareness among targeted consumers (ages 29-54, with \$75K+ HHI). The all-star, award-winning campaign that featured innovative creative executions was designed to highlight California's diversity positioning, while also capturing the free-spirited attitude and lifestyle that people worldwide want to become part of on their vacations. The advertising was then leveraged by vertical industry cooperative programs through a variety of marketing mediums.

## Advertising — “California, Find Yourself Here”

### “Welcome to California”

#### Television Spot

The CTTC launched a new advertising campaign in April 2004 that continued the “California, Find Yourself Here” theme and tagline from prior years. The campaign featured the highly-acclaimed, 30-second “Welcome to California” television spot — showcasing California's icons and

celebrities, such as Jack Nicholson, Clint Eastwood, Michael Eisner, Wolfgang Puck, and new for 2004, Governor Schwarzenegger and first lady Maria Shriver. The television ad ran in April, May and June in Seattle, Portland and Phoenix, and was added into the programming for *The Best of California* television series (see details on page 4).



### Print Cooperative Inserts

Expanding the reach of the television run was a concurrent eight-page spring/summer cooperative print insert that highlighted a variety of California activities and venues. The insert ran in the May 2004 issues of *National Geographic Traveler*, *Frommer's Budget Travel* and *Travel & Leisure*. In addition, to create a bridge between the 2003 and 2004 campaigns, an eight-page winter cooperative print insert ran in the November 2003 issues of



CTTC's 30-second “Welcome to California” television spot.



*National Geographic Traveler* and *Frommer's Budget Travel*, reaching over 1.2 million consumers. Both the spring/summer and winter cooperative inserts were also distributed at trade shows and travel industry events, and were posted online.

### “Offer Wizard”

Travel industry partners were encouraged to get involved in the “California, Find Yourself Here” campaign by taking advantage of the free online “Offer Wizard,” a fully-interactive, itinerary-based planning tool that highlights special travel values and incentives on [www.visitcalifornia.com](http://www.visitcalifornia.com) and [www.bestofcaliforniatv.com](http://www.bestofcaliforniatv.com). Interested California companies are still encouraged to submit product offers and discounts.

### Advertising Return-on-Investment

California’s spring 2003 advertising campaign generated a strong return-on-investment (ROI). Research indicates that the campaign influenced<sup>1</sup> 4.9 million visitors, totaling \$1.99 billion in travel and tourism spending and \$80.1 million in tax revenues, for a \$483-to-\$1 ROI in spending and \$19.46-to-\$1 ROI in taxes. Actual incremental travel<sup>2</sup> generated 463,115 visitors, totaling \$216 million in travel spending and \$8.7 million in state tax revenues.<sup>3</sup>

<sup>1</sup> Influenced: Influenced travelers are those who recalled seeing at least one CTC ad prior to travel to the state.

<sup>2</sup> Incremental travel: The number of additional trips and visitors attributable to the advertising campaign. (If they did not see the advertising, they would not have traveled). This is calculated by comparing the level of travel among the ad-aware to the level of travel among the non-aware and then counting only the difference.

<sup>3</sup> Source: Strategic Marketing & Research, Inc.

### Market Share

Despite these impressive advertising campaign results, California’s overall share of the domestic market dropped from 11.5 percent to 10.7 percent in 2003. The leading causes continue to be an advertising budget that is dwarfed by competing states, coupled with inflationary

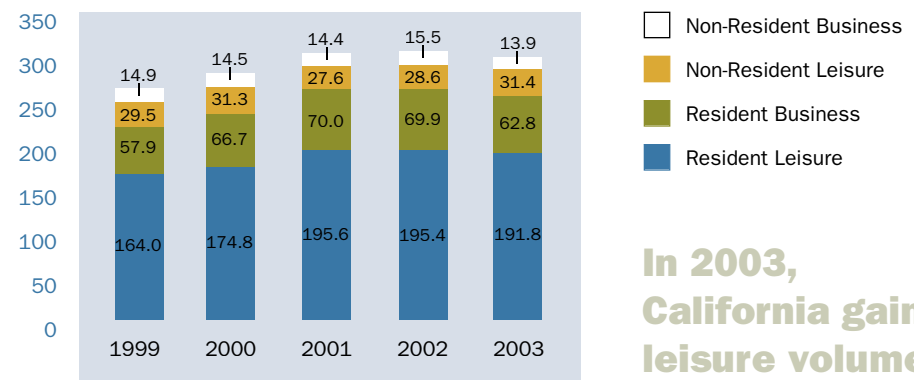
pressures, such as the rising cost of media that forced California to have limited media coverage. These factors are supported by the fact that California actually gained leisure volume out-of-state where the advertising ran, and lost leisure volume in-state where no advertising ran and business travel was down — all contributing to an overall loss in market share (see charts below).

It is important to note that from 1998–2002, when the overall tourism marketing budget was fully funded at approximately \$14 million for four consecutive years, California’s domestic market share increased from 9.7 percent to 11.5 percent, reversing a decade-long decline. This increase generated an additional 50.7 million person-trips, \$8.7 billion in visitor spending and 120,000 jobs for California.

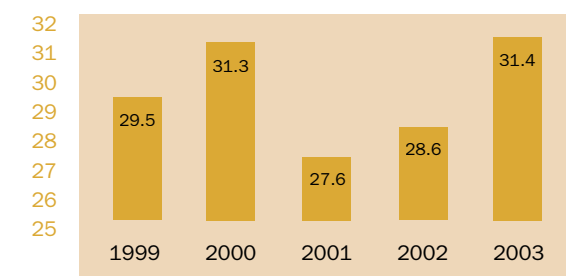
**California Domestic Market Share (% U.S. Person-Trips)**



**California Volume by Segment (Person-Trips in Millions)**



**Non-Resident California Leisure Volume (Person-Trips in Millions)**



**In 2003, California gained leisure volume out-of-state where the advertising ran, and lost leisure volume in-state where no advertising ran.**



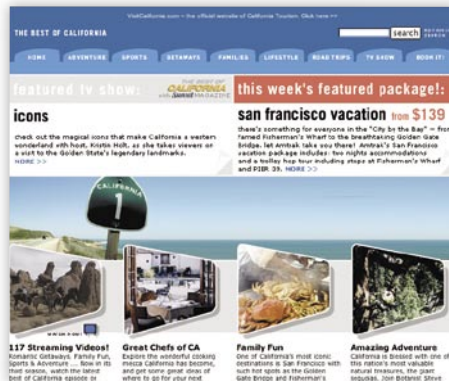


## Cooperative Marketing

The CTTC was able to leverage the core “California, Find Yourself Here” branding campaign with over 20 cooperative marketing programs, representing unique visitor interest segments — from shopping and dining, to culture, outdoor recreation, and more. Since 1998 when the CTTC was formed, these unique public-private partnerships helped generate an additional \$100 million in exposure to promote travel to California, enabling California to compete with other tourist destinations like Hawaii, Florida and Las Vegas with much larger marketing budgets. Highlights of the CTTC’s cooperative programs are provided on the next three pages.

### **The Best of California (TBOC) Television Series and Web Site**

Launching in April 2004 alongside the advertising campaign was a new 13-week season of *The Best of California* (TBOC) television show and Web site. Within this highly-entertaining TV series, the travel writers and editors of *Sunset* magazine



explore California travel. The 30-minute series ran on primary network affiliate stations in 19 western U.S. markets, with the potential to reach 15 million TV households. This included a Spanish language version, *Lo Mejor de California*, which was carried by Telemundo stations throughout California, with a reach of 2.7 million Hispanic TV households. Viewers were directed to the interactive [www.bestofcaliforniatv.com](http://www.bestofcaliforniatv.com) Web site, which continues to provide additional details on travel products, streaming video, special deals and downloadable coupons via the “Offer Wizard.”

### **Shop California**

Shop California’s recent winter 2003 and spring 2004 cooperative advertising campaigns continued to promote shopping as a year-round activity. These efforts were supported by the enhanced [www.shopcalifornia.org](http://www.shopcalifornia.org) Web site, which provided a guide to navigate through California’s varied shopping destinations — including world-class shopping centers, name-brand boutiques, outlet malls, outdoor marketplaces, specialty shops, and more. A value-added offer provided a downloadable voucher from the Web site to receive savings and incentives at participating locations. Shopping centers,



individual stores, downtown districts and associations were invited to take advantage of the wealth of opportunities by joining Shop California or by obtaining a free listing at [www.shopcalifornia.org](http://www.shopcalifornia.org).

### **Dine California**

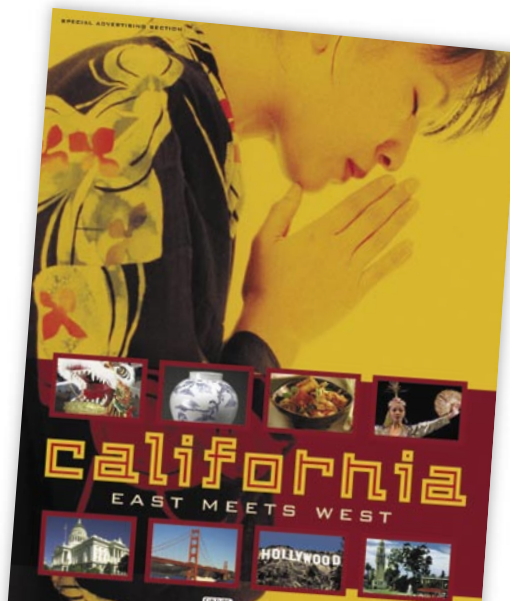
Dine California was originally created to form a natural partnership between tourism and the \$46-billion restaurant industry in California. Throughout the CTTC’s advertising creative, print publications, Web site and cooperative programs, fresh California products are constantly portrayed, food and wine pairings are utilized, famous chefs are highlighted, and both domestic and international promotional events for the travel trade feature themes built around the “Taste of California.”

### **Culture California**

The Cultural Tourism Coalition continued the celebration of California’s diverse cultural heritage with the eight-page insert, “California — East Meets West,” featuring Asian-Pacific Islander heritage. The insert ran in the May 2004 issue of *Sunset* magazine, reaching one million consumers in western U.S. markets. The goal of this campaign was to entice the consumer into taking a cultural journey through California after exploring

## Did You Know? Fast Facts

- In its third season, *The Best of California* (TBOC) TV show expanded to 19 western U.S. markets, with the potential to reach 15 million TV households. The interactive TBOC Web site ([www.bestofcaliforniatv.com](http://www.bestofcaliforniatv.com)) generated 450,000 visitor sessions from May 2003 through June 2004.
- Dining, shopping and entertainment are the most popular expenditure-based activities among California travelers. Sightseeing, followed by visiting theme and amusement parks, and beach and waterfront activities, are the most popular recreational pursuits.





all this great state has to offer on [www.culturecalifornia.com](http://www.culturecalifornia.com). All cultural heritage venues are encouraged to go online and add their content to this highly-visited site.

### Wild Vacations in California

Wild Vacations in California — a marketing program now in its seventh year that offers travel-related discounts to 36.5 million employees in the western United States — distributed more than two million new coupon booklets in January 2004. Program elements also included: personalized e-mail blasts; direct mail; telemarketing; and a popular, updated [www.wildvacationsca.com](http://www.wildvacationsca.com) Web site. Last year, participating California attractions received more than 50,000 coupon redemptions that resulted in \$6 million in revenue, while hotels generated over 25,000 room nights for approximately \$2.5 million in revenue.

### California Fun Spots

The California Fun Spots program continued a partnership with Mervyn's® of California by delivering 4,765,000 discount coupons to consumers throughout western U.S. markets in 2003. Total redemptions for the year were 51,106, generating nearly \$2 million in revenues. In addition to ticket sales, in-park spending from the Fun Spots program was estimated to have generated slightly over \$1 million for participating partners. The corresponding 10 percent scratch-off discount program in Mervyn's® stores generated over \$2.2 million in sales, contributing over \$163,000 in sales tax revenues to California. Participants in the 2003 program included: Knott's Berry Farm, LEGOLAND® California, Monterey Bay Aquarium, San Diego Zoo, San



Diego Zoo's Wild Animal Park, SeaWorld Adventure Park San Diego, Six Flags Magic Mountain, Universal Studios Hollywood™ and Disneyland®. The Fun Spots have recently launched a new Web site, [www.cafunspots.com](http://www.cafunspots.com).

### California Outdoor Recreation

California continued its development and support of the official outdoor recreation Web site, [www.californiarecreation.com](http://www.californiarecreation.com), providing enthusiasts with a single point of information for outdoor recreation activities. The site includes a resource base of more than 50 different types of activities, over 6,000 trails, and much more. The program's partners include the CTTC, Earth 911, Wildernet and California State Parks.



### California Snow

The CTTC, in partnership with the California Ski Industry Association, distributed 150,000 copies of *California Snow* magazine throughout the western U.S. last year. The four-color, 32-page publication covers all regions of the state and continues to be the definitive consumer resource for the state's winter sports. Internationally, this cooperative ski/snow program again co-sponsored the Warren Miller film tour at 52 venues throughout the UK and Ireland, distributing *California Snow* magazine, posters and DVDs during the tour. Additionally, partnerships with Virgin

Holidays and Virgin Atlantic Airways continued, attracting large numbers of skiers and snowboarders to California throughout the season. Promotional efforts translated into approximately \$10 million in revenues for California, with the majority spent in rural areas.

### California Golf

This past year, the California Golf marketing program released its second annual official golf guide, expanded the [www.californiagolf.com](http://www.californiagolf.com) Web site to include hotel packaging and launched a customized golf itinerary planning service. Major accomplishments during the year also included: partnering with *Golf Digest Japan* for six months to feature the California golf product; a six-month promotional campaign with Beringer Vineyards, featuring more than 500 golf clubs in the UK; conducting the inaugural California Cup Invitational for key international tour operators; and producing the California Golf television series. Distribution of the TV series was secured on the *Golf Channel* in the UK and on the *Travel Channel* in Europe, where it was translated into eight languages. The [www.californiagolf.tv](http://www.californiagolf.tv) Web site was created to offer downloads from the 13-episode series and provide booking of golf packages.





## **Adventures in Wild California IMAX Film**

Building on the momentum of this \$30-million global marketing endeavor, *Adventures in Wild California* continued to play in more than a dozen international and domestic theaters in 2003, bringing the cumulative total to over 75 theaters on five continents. The film has now been distributed in DVD and VHS formats and is sold at retail outlets worldwide.

## **Did You Know? Fast Facts**

- ➡ The CTTC's media relations efforts resulted in approximately \$32.8 million worth of California coverage worldwide in the 2003–2004 fiscal year.
- ➡ Tourism helps diversify and stabilize rural economies. On the average, each California county earns approximately \$1.3 billion per year in direct travel expenditures by visitors.
- ➡ California is the number one travel destination in the United States. The California tourism economy is 1 1/2 times the size of the Florida tourism economy, 2 1/2 times the size of the New York tourism economy and 5 times the size of the Hawaii tourism economy.

## **Airline Partnerships**

### **• Southwest Airlines Promotion**

To celebrate California tourism and kick off the summer travel season, the CTTC and Southwest Airlines teamed up to throw an all-day “California-style” party in the sky on June 3, 2004. Representatives from the CTTC and Southwest Airlines boarded the custom-designed “California One” plane and flew with customers to San Diego, Sacramento, Portland and Phoenix to promote tourism to California. The total estimated value of media coverage for this one-day event was \$7,000.

### **• United Airlines Partnership**

The CTTC continued to expand its partnership with United Airlines worldwide in the following trade and consumer activities: the Global Sweepstakes, a promotional incentive campaign targeted at the United Airlines’ regional sales offices in the Atlantic, Pacific and Latin America; the promotional launch of the airline’s Web site dedicated to its 1K Mileage Plus executives that featured exclusive seating at the AT&T Pro Am in Monterey; title sponsorship of the California Golf television series, playing on various networks in Europe and broadcast on United’s route network; and the United Airlines Employee Travel Web site, where California enjoys one of two destination spots that provides valuable travel offers to the airline’s 75,000 employees worldwide.

## **Communications — Media Relations**

### **Media Relations Results**

Generating positive publicity and more media exposure for California as a premier travel destination continues to be a top priority for the CTTC. With the new hire of Edelman public relations firm and Governor Schwarzenegger’s strong support for the tourism industry, the CTTC generated \$8,268,622 worth of domestic coverage for California. All efforts combined with international PR offices resulted in close to \$32.8 million worth of coverage worldwide.

### **“Welcome to California” Ad Campaign — Media Launch**

The CTTC and Edelman leveraged the Governor’s appearance in the new “Welcome to California” TV spot, launched in mid-April, through a video news release. California broadcast coverage of this launch generated more than 3,108,739 gross measurable impressions. The total value of the media coverage was \$262,814.



Governor Schwarzenegger addresses attendees at the CTTC's New York media event.

### **New York Media Marketplace and Reception**

The CTTC conducted a media marketplace and reception in New York City on February 24. A record number of forty-four California delegates met with

Numbers within the media relations section on pages 6-7 are derived from PRtrak®, the leading aggregator of “output measurement metrics” in the public relations industry, with broadcast, print and Internet data provided by: Arbitron, Nielsen, SRDS, SQAD, comScore Media Metrix, Burrelle’s Information Services and American Newspaper Publishers.





150 key New York consumer and travel trade journalists, including: *Frommer's Budget Travel*, *Bon Appétit*, *Conde Nast Traveler*, *Elite Traveler*, *fodors.com*, *Food & Wine*, *Men's Journal*, *Money*, *New York Post*, *New York Times*, *Spa Finder*, *Today Show*, *Town & Country*, *Travel & Leisure*, *Woman's Day*, and others. Story ideas were pitched to generate positive print and broadcast coverage, with the goal of increasing visitation to California. In addition, the California delegation was joined by Governor Arnold Schwarzenegger, who addressed members of the travel media and challenged them to visit California. The total media value of the event was \$176,415. CTTC staff also conducted individual meetings with key members of the New York media.

#### **TIA Discover America Pow Wow**

Los Angeles was host of the Travel Industry Association's (TIA's) international Pow Wow in April 2004. Over 5,000 delegates, including more than 300 media, gathered in California and visited locations throughout Los Angeles. In addition, this year approximately 50 media attended post-show familiarization tours that visited regions within the state. Governor Schwarzenegger was the star attraction when he delivered the keynote address to delegates and encouraged buyers to send their clients to visit California.

#### **Wildfire Communications Plan**

The CTTC and Edelman, along with tourism groups in the San Diego, Big Bear Lake and Los Angeles areas, drafted and implemented a crisis communications plan to inform the media and the public about the severity and facts of the Southern California wildfires in October 2003. The plan was divided into two phases. The first phase addressed the immediate needs of

travel writers and visitors who required the latest information on the impact of the wildfires on popular tourist destinations. The second phase focused on the recovery effort and encouraged tourists from around the world to visit California to help the region bounce back from the crisis. Through its print and online media, radio media tour and audio news release efforts, the CTTC successfully generated more than 20 million gross measurable impressions worldwide. The estimated media value of this coverage was more than \$259,964.

#### **Feature Releases and Stories**

Topping last year's efforts, twenty-seven press releases and media advisories were distributed to the travel media featuring various California themes, CTTC programs, publications, promotions and research findings. The CTTC also developed three issues of *What's New in California*, a major round-up release about new developments in California tourism. Each issue was sent to nearly 3,000 national and international writers, editors and broadcasters. This quarterly update continued to be routinely used by *Destinations*, *Travel Agent*, *Contra Costa Times*, *Sacramento Bee*, *Seattle Times*, *Knight-Ridder Newspapers* and *Associated Press*, among other publications. Foreign language versions of *What's New in California* were also published in German, Japanese, Portuguese and Spanish. Additionally, one highlight of the media relations efforts was the national broadcast coverage of Big Sur as a child-friendly vacation destination on NBC's *Today Show*, generating more than 6,181,111 measurable gross impressions, with an estimated total broadcast coverage value of \$6,136,000.

#### **Ongoing Activities**

In the 2003–2004 fiscal year, the CTTC responded directly to more than 1,100 inquiries and fielded hundreds of media inquiries at numerous trade shows and conferences, including: La Cumbre (Miami), JATA (Japan), World Travel Market (United Kingdom), California/Las Vegas/Arizona Sales Mission (Mexico), ITB (Germany), California Travel Market (Anaheim) and TIA Discover America Pow Wow (Los Angeles). More than 50 press trips were coordinated by the CTTC throughout the state for travel journalists, photographers, filmmakers and broadcasters from Argentina, Australia, Brazil, Germany, Japan, the United Kingdom and the United States. The Web site, [www.visitcalifornia.com](http://www.visitcalifornia.com), was made "press friendly" with the availability of a Press Room section. Accessible by "clicking" the Press Room button, the page includes: news releases, *What's New in California*, feature stories, popular photos, a California fact sheet, tourism statistics, story ideas, media relations contacts, and additional information useful for developing a California tourism story. From July 2003 through June 2004, the CTTC Press Room received 23,942 page visits.

#### **Overseas Public Relations Results**

From July 2003–June 2004, efforts in Germany, Austria and Switzerland resulted in publicity with an ad equivalency value of more than \$8.7 million, and 1,721 California-related press inquiries were fielded. Publicity and promotional efforts in Japan were directly responsible for more than \$10 million in California coverage, and 824 press contacts were made on behalf of California. Public relations efforts in the United Kingdom generated 1,293 contacts, with a total publicity value of \$5.8 million.

## Did You Know? Fast Facts

- ➔ From July 2003 through June 2004, the CTTC's [www.visitcalifornia.com](http://www.visitcalifornia.com) Web site totaled 2.8 million visitor sessions and 1.1 million unique visitors. Users to the site averaged a total of eight minutes and 13 seconds per visitor session.
- ➔ Strategically located across the state, California Welcome Centers received more than 855,000 walk-in visitors, requesting a variety of information on traveling throughout California, in the 2003 calendar year.
- ➔ From January–December 2003, the CTTC's international offices in Australia, Brazil, Germany, Japan and the UK responded to 24,457 consumer and trade requests for California travel information.
- ➔ The CTTC's visitor publications generated \$33.5 million in new traveler spending in 2003, along with \$1.35 million in state tax revenues.
- ➔ Travel and tourism is the fourth largest employer in California, following professional and technical services, health care and construction.
- ➔ Millions of jobs have vanished in the United States over the last few years due to outsourcing. However, tourism jobs cannot be outsourced overseas. From January 2001 through January 2004, thousands of jobs have been *lost* in California in the manufacturing, information and trade sectors, while travel and hospitality have continued to *add* jobs.

## Communications — Visitor Information

The CTTC produced a variety of trade and consumer publications to encourage and assist travelers making plans to visit California. More than 200,000 informational packets were sent out from the CTTC's fulfillment house in the 2003 calendar year. Following are the CTTC's key visitor publications:

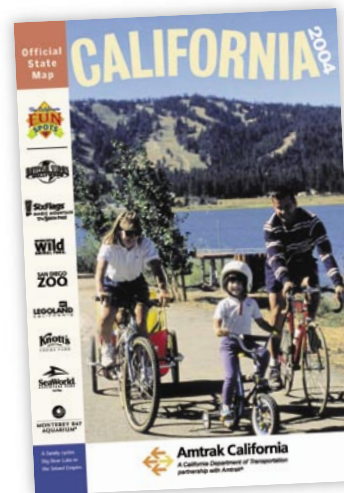
### **California 2004 Official State Visitor's Guide and Travel Planner (CVG)**

The CVG, the CTTC's flagship visitor publication, contains special features, regional information and easy-to-read maps that help make travel planning simple and fun. Inside are more than 2,500 listings, including attractions, entertainment, accommodations, outdoor recreation, parks and public lands, suggested itineraries, editorial features, shopping, and more. The CVG has a circulation of 500,000 copies and is distributed worldwide.



Research shows that undecided persons who “converted” to visitors or who extended their stays after receiving travel literature from the CTTC in 2003 generated an estimated \$33.5 million in travel spending and \$1.35 million in tax revenues. Every dollar invested in the fulfillment program generated a return of \$1.84 back into state tax coffers. Approximately 17 percent of those who requested a guide in 2003 were influenced to extend their trips, spending an average of three additional days in California, and contributing more than \$18 million out of the total \$33.5 million in documented fulfillment program impacts.<sup>1</sup>

<sup>1</sup> Source: Strategic Marketing & Research, Inc.



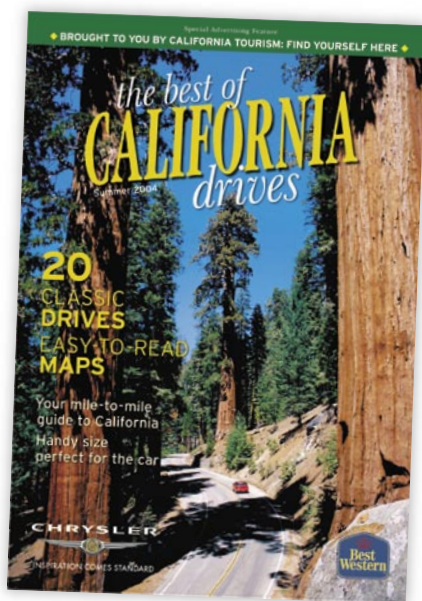
### **California 2004 Official State Map**

The *California 2004 Official State Map* continued at a circulation of one million, with 500,000 copies bound into the CVG.

### **The Best of California Drives**

Further enhancing the recent surge in drive-market travel was the release of *The Best of California (TBOC) Drives* publication in spring 2004. *Sunset* magazine and the CTTC collaborated to produce this new issue of TBOC Drives, with a circulation of one million. A total





of 700,000 four-color driving guides were inserted into *Sunset* magazine's June 2004 issue for subscribers in California, Arizona and Nevada. An additional 150,000 copies were included in the CTTC's fulfillment packets, and 150,000 copies were distributed by California State Parks. The driving itineraries were also made available online at [www.visitcalifornia.com](http://www.visitcalifornia.com).



### CTTC's Web Site

Continuing as one of the most visited destination sites in the world, activity on [www.visitcalifornia.com](http://www.visitcalifornia.com) remained strong, with a total of 2.8 million visitor sessions and 1.1 million unique visitors in the 2003–2004 fiscal year. During these 12 months, the Web site also averaged

five million hits per month, with an average visitor session of eight minutes and 13 seconds.

### California Welcome Centers (CWCs)

In the 2003 calendar year, CWCs — California's official visitor information and traveler service centers — received 855,015 walk-in visitors. Strategically located across the state, the 11 California Welcome Centers can be found in: Anderson, Arcata, Auburn, Barstow, Los Angeles, Merced, Oceanside, San Francisco, Santa Ana, Santa Rosa and Yucca Valley.



## Travel Trade Development

### Overview

The CTTC's travel trade development program included a baseline of domestic activities that focused on outreach to key tour operators at major travel-industry trade shows. On the international front, the CTTC maintained its presence in primary markets, retaining its representation offices in Australia, Brazil, Germany, Japan and the UK. An aggressive schedule of trade, press and promotional activities were carried out in the key markets of Australia, Canada, Germany, Japan, Mexico and the UK, as well as secondary markets in Brazil, France, Ireland, Scandinavia and Spain. Although a lull in international visitation was seen in

mid-2003, a resurgence of key currencies and strengthening of selected economies, combined with dedicated and innovative marketing, helped fuel tremendous growth from late 2003 through June 2004.

### Domestic

The CTTC concentrated its domestic travel trade efforts by actively participating in California Connection, a grassroots cooperative marketing group targeting the group travel sector. Participating in key trade shows associated with the National Tour Association and the American Bus Association helped keep the state top-of-mind for group travel planners.



### California Tourism Online

In addition to the main CTTC Web site at [www.visitcalifornia.com](http://www.visitcalifornia.com), one of the most visited destination sites in the world, these cooperative program sites were also created with direct links:

[www.shopcalifornia.org](http://www.shopcalifornia.org)

[www.culturecalifornia.com](http://www.culturecalifornia.com)

[www.cafunspots.com](http://www.cafunspots.com)

[www.californiagolf.com](http://www.californiagolf.com)

[www.california4meetings.com](http://www.california4meetings.com)

[www.californiarecreation.com](http://www.californiarecreation.com)

[www.visitcwc.com](http://www.visitcwc.com)



## Did You Know? Fast Facts

- California Tourism produces approximately eight key research reports every year, including traveler demographics and trends, available for free or a nominal shipping charge. As well, new travel statistics are posted regularly on the CTTC's Web site, [www.visitcalifornia.com](http://www.visitcalifornia.com).
- During the 2003-2004 fiscal year, CTTC staff presented at over 75 travel industry events, while CTTC regional marketing representatives met with almost 3,000 businesses and travel colleagues statewide.
- Californians themselves are the mainstay of the state's travel and tourism industry, comprising 86 percent of in-state domestic travel.
- California is the number one travel destination in the United States, receiving 21 percent of all overseas visitors.

## Do You Know? CTTC Program Contacts

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### International

The five overseas offices in Australia, Brazil, Germany, Japan and the UK led the charge to ensure California occupied prominent positioning in key trade and consumer exhibitions in their respective markets. California promotional platforms for the travel industry were organized by the CTTC at more than 40 exhibitions in nearly two dozen countries, including JATA (Tokyo), World Travel Market (London), ITB (Berlin), ARLAG (Guadalajara), Confex (London) and Go West Summit (Reno).

The CTTC also coordinated promotional platforms for the travel industry meetings and incentive sector by providing "selling" opportunities at key exhibitions, such as ITME in Chicago, IMEX in Frankfurt and AIME in Australia. The meetings and incentive Web site, [www.california4meetings.com](http://www.california4meetings.com), continued to offer meeting planners around the world access to venues in many gateway and secondary cities.

Additionally, new branding partners such as the California Wine Institute have introduced a series of small cooperative marketing opportunities for the trade and press. These partnerships are expected to grow significantly in 2004–2005.

### International Market Training

As part of California's membership in the Western States Tourism Policy Council — stemming from a grant from the U.S. Department of Commerce to seek out small to medium enterprises to market to international tour operators — the CTTC conducted training seminars in Napa, Tahoe City, Sacramento, San Luis Obispo and Santa Barbara. Through June 2004, these free seminars helped expose approximately 150 businesses to the benefits of adding international visitors

to their product base. The training program continues in the summer and fall of 2004 in other regions throughout the state.

### CTM and Pow Wow

The CTTC helped orchestrate a successful international buyer attendance at the April 2004 California Travel Market (CTM), which surpassed the targeted attendance by nearly 30 percent. Pow Wow, the travel industry's largest international tourism exchange, was held in Los Angeles and attracted over 5,000 delegates. The CTTC organized a unified floor presence at Pow Wow for the nearly 200 California-based companies, arranged for the Governor's keynote address and conducted seven post-show familiarization tours that attracted 81 press and trade delegates.

### International Consumer Promotions

Highlights for the fiscal year included: a five-month newspaper campaign in the UK's *Western Daily Press*, featuring a range of California destinations; and the Selfridges promotion with Jelly Belly in the UK, totaling nearly \$200,000 in media exposure. Other promotional activities were carried out with Kendall Jackson in the UK, *Golf Digest Japan*, DER and Hilton Hotels in Germany.

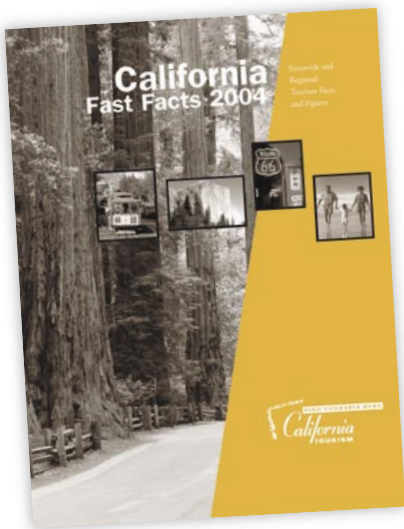
## Research

### Monthly Online Bulletins

This past fiscal year, monthly bulletins featuring California travel statistics were created and posted on the CTTC's [www.visitcalifornia.com](http://www.visitcalifornia.com) Web site. Data includes the most current research, such as domestic and international airport arrivals at LAX and SFO, hotel occupancy, California Welcome Center visitation, Web site traffic, and other key travel indicators. Interested companies were encouraged to send in their contact information to receive a free monthly e-mail subscription linking to the site.

## Publications

A host of research publications were also published to provide valuable information about California visitor statistics, travel trends and forecasts. New reports, articles and data were posted regularly within the Travel Industry/Research & Statistics section of [www.visitcalifornia.com](http://www.visitcalifornia.com). The flagship research publication, *California Fast Facts 2004* — a comprehensive, easy-to-read, 22-page publication containing key statewide and regional travel and tourism statistics — was published and posted online.



## Evaluation Studies

Research was also conducted to evaluate ongoing marketing programs, such as advertising and fulfillment effectiveness studies. Results are included within those respective sections on pages 3 and 8.

## Travel Industry Outreach and Communication

### CTTC Regional Marketing Representatives

From July 2003 through June 2004, CTTC regional marketing representatives met with almost 3,000 businesses and travel colleagues throughout the state. The goal of this program is to spread the word about the extensive CTTC marketing and cooperative programs available — many at little or no cost.

### Speeches and Conferences

Along with the one-on-one or small group meetings, CTTC staff delivered presentations at over 75 travel industry meetings, events and conferences.

### CTTC Newsletter

The CTTC newsletter was distributed on a bi-monthly basis to keep all California travel-related businesses informed about the CTTC's current marketing programs and partnership opportunities.

### Insights Newsletter

Three editions of *Insights* — a 16-page, four-color newsletter that informs California travel and tourism businesses and destinations about how they can take greater advantage of the CTTC's services and marketing programs — were written and distributed to approximately 12,250 organizations and individuals, including all 5,000 assessed businesses.



## 2003 Contacts and Leads

January–December 2003

**163,827**

E-mails to California Tourism, calls to 800#, and informational packets ordered online

**200,101**

California Tourism informational packets sent to visitors

**10,303**

Informational calls to California Tourism and Assessment Team

**24,457**

International trade and consumer contacts

**829**

Research contacts and reports mailed

**4,741**

Direct media relations inquiries

**855,015**

California Welcome Center visitors (walk-ins)

**60,091,132**

Web site hits

**3,249,994**

Web site visitor sessions





## California Travel and Tourism Commission (CTTC)

The 37-member CTTC is comprised of individuals from all 12 regions of California. Members represent four principal industry sectors: Accommodations; Restaurants and Retail; Attractions and Recreation; and Transportation and Travel Services. Twenty-four of the commissioners are elected by the approximately 5,000 assessed California businesses; 12 are appointed by the governor; and the 37th is the California Business, Transportation and Housing Agency Secretary, who also serves as the CTTC Chair. The Commission meets three times a year to direct the CTTC's programs and activities. As well, a 34-member statewide Marketing Advisory Committee provides input in developing the marketing plan.

### Chair

Sunne Wright McPeak, Secretary,  
Business, Transportation and Housing Agency  
(appointed 1/1/04)

### Governor-Appointed Commissioners by Region

**Central Coast**, Ted Balestreri, Cannery Row Company

**Central Valley**, David Blasko, Six Flags Theme Park,  
Marine World

**Gold Country**, John Dunlap III, California Restaurant  
Association

**Deserts**, Mike Fife, Palm Springs Desert Resorts  
Convention and Visitors Authority

**Los Angeles County**, Tadao Fujiwara, M.D.

**San Francisco Bay Area**, Jack Gribbon,  
Hotel Employees and Restaurant Employees  
International Union

**San Diego County**, Charles Hansen, Viejas Enterprises

**Shasta Cascade**, John Koeberer, California Parks  
Company

**Orange County**, James "Walkie" Ray, Sanderson-  
J Ray Development

**High Sierra**, Vacancy

**North Coast**, Vacancy

**Inland Empire**, Vacancy

**San Francisco Bay Area**, John Marks, San Francisco  
Convention and Visitors Bureau  
(served until 8/19/03)

**Orange County**, Bill O'Connell, Stovall's Best Western  
(served until 8/19/03)

### Elected Commissioners by Industry

#### Accommodations

Jim Abrams, California Hotel and Lodging Association  
Rick Anderson, Casa Tropicana\*

**CTTC Vice Chair**-Claire Bilby, Walt Disney Parks  
and Resorts

Timothy J. Bridwell, Fess Parker's Doubletree Resort\*

John Douponce, Le Montrose Suite Hotel\*

Mark Erskine, San Diego Marriott Hotel and Marina

Michael Gelfand, Terra Vista Management

Jon S. Handlery, Handlery Union Square Hotel\*

Charles Hays, Far Horizons 49er Village Resort

Rick Lawrance, California Lodging Industry Association

Reggie McDowell, Interstate Hotels/MeriStar\*

Cormac O'Modhrain, Hyatt Regency Huntington  
Beach Resort\*

J.P. Patel, Best Western Colony Inn\*

Reint Reinders, San Diego Convention and

Visitors Bureau\*

Terry Westrope, Sterling Hotels\*

Vacancy

James J. Amorosa, Motel 6 & Studio 6\*\*

Glyn Davies, Simpson House Inn\*\*

Anne Evans, Evans Hotels\*\*

Greg Hendel, Best Western Palm Springs

(resigned 5/20/04)

John Kautz, Murphy's Hotel\*\*

Chris Middleton, American Hotels, Inc.\*\*

Gene Zanger, CASA de FRUTA\*\*

### Restaurants and Retail

**CTTC Vice Chair**-Ted Burke, Shadowbrook Restaurant

Tom Voltin, SAKS Fifth Avenue

Bill Dombrowski, California Retailers Association

Ric Service, Las Casuelas Terraza\*\*

### Attractions and Recreation

Bob Roberts, California Ski Industry Association

Don Skeoch, Universal Studios Hollywood

(nominated 6/04)

Heidi Geier, Universal Studios Hollywood (resigned 5/04)

## CTTC Year in Review

### State of California

**Arnold Schwarzenegger**, Governor

**Sunne Wright McPeak**, Secretary, California  
Business, Transportation and Housing Agency  
Chair, CTTC

### CTTC

**Caroline Beteta**, Executive Director

**Jennifer Jasper**, Deputy Director,  
Communications

**Lisa Kruttschnitt**, Director of Public Affairs,  
*Year in Review* Editor

**Leona Reed**, Communications Coordinator,  
*Year in Review* Assistant Editor

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the California Travel and Tourism Commission  
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[www.visitcalifornia.com](http://www.visitcalifornia.com)

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Tourism Commission

### Transportation and Travel Services

Rita Vandergaw, Port of San Diego

**CTTC CFO**-Terry MacRae, Hornblower Cruises & Events  
Diana Meinhold, Automobile Club of Southern CA (AAA)\*

Michael Gallagher, CityPass, Inc.\*\*

Anastasia K. Mann, The Corniche Group\*\*

\* (elected to CTTC 2/1/04)

\*\* (term ended 12/31/03)



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